

Note 1: RFI numbering system could be different for subcontractors, prime contractor, engineering home office and client. See example on next page

Note 2: RFI can be originated by anyone on site and can only be submitted by "RFI Coordinator Training" received personnel.

However, RFI should be assessed by subcontractor's project engineering team (single point of contact on site) before it is submitted to CMT Field Engineer /Home Office Design Engineering or client.

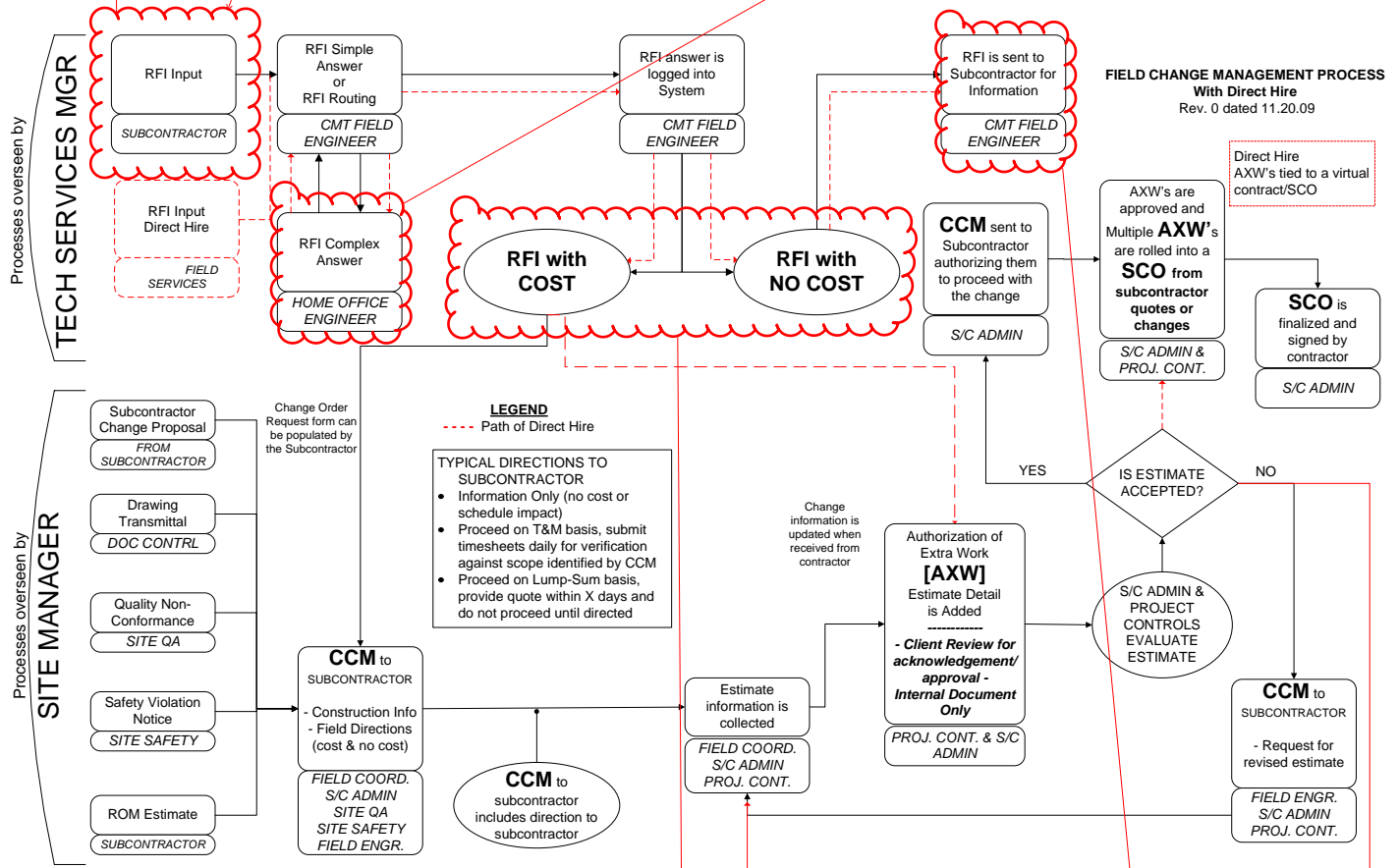
RFI can be rejected or sent back to originator for additional information along with explanation anytime during this process.

## RFI (Request For Information)

Note 3: Single point of contact from CMT Field Engineer /Home Office Design Engineering or client distribute to people who are available or who has the most knowledge on that subject.

RFI can be rejected or sent back to originator for additional information along with explanation.

## Submit RFI (Request For Information) Introduction and Instructions



Note 5:

Subcontractors Field Engineering Team Cost/Schedule Review can be different than CMT Field Engineering Cost/Schedule Review.

Note 4: Distribution List @ Subcontractor's end.

Subcontractors Field Engineering Team Maintains a "Distribution List" in this Web Based tool. Once the RFI is responded by CMT Field Engineer, RFI goes back to single point of contact from "Subcontractor's Project Engineering Team for Cost/Schedule Review.

Note 1.



REQUEST FOR INFORMATION

Originator fields are *RED* and *italic* text, RFI Response

Suncor RFI #: 03-00025-01-20-C0-RFI-64-P-2724 Rev 1



Originator RFI #: JVD\_5170-RFI-486

**Section Explanation:**

To Submit a RFI, we need to implement the following steps:

1. Select Project
2. Create RFI
3. Enter RFI Core Information
4. Enter RFI Notes
5. Enter RFI Impact
6. Enter Courtesy Copies
7. Attach Files
8. Assign W
9. Save RFI
10. Notification Sent/Received

**Legend Key**

<b>Bold</b>	Converge Field or Menu Item		Select
	Special Note		

- 1) Select your project from the **Portfolio** view.

★ Enter will take you directly to the project data and Edit will display the Project's general information.

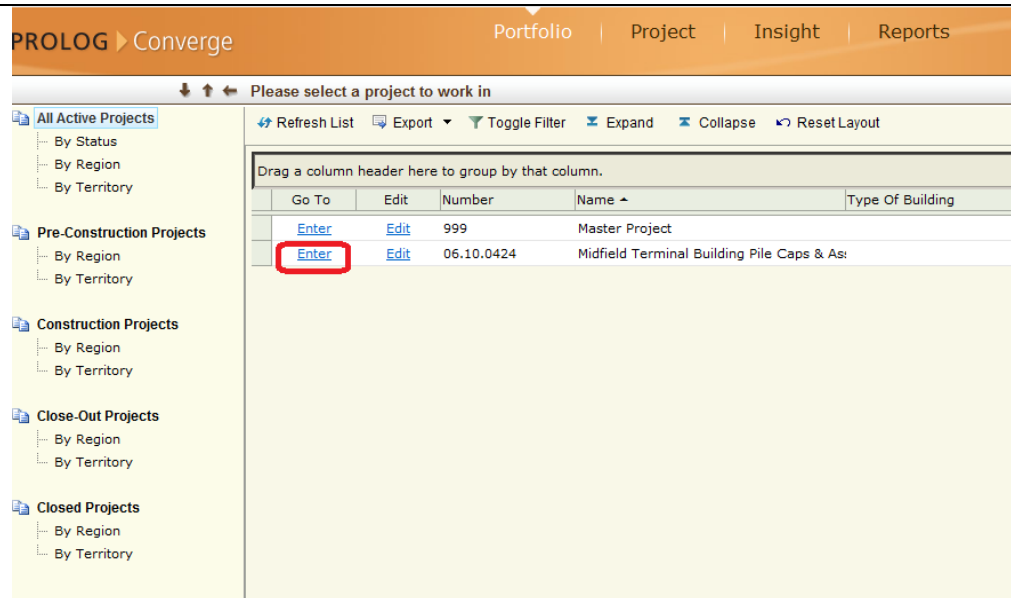


Figure 1.0

- 2) Select **Create** from The Document Control RFIs Menu



Figure 2.0

- 3) Enter RFI Info

Enter the following fields:  
**Subject, Importance, Discipline, Category, Author Number** (if applicable), **Question** (Click Add/View Comments...)

The following field will be auto-populated:  
 Number,  
 Date Created  
 Date Required,  
 Author Company,  
 Authored By

★ Several fields may be read-only depending on your permissions

The screenshot shows the RFI entry form. At the top are buttons: 'Save and Exit', 'Copy', 'Print', 'Send', 'Create Link', and 'Word Merge'. Below are input fields for 'Project Number' (108), 'Subject' (TEST), and 'Importance'. A 'Next' button is next to the Project Number field. Below these are tabs: 'General Info', 'Notes', 'Contract Drawings', 'Collaboration', 'Impact', 'Courtesy Copies', 'Files (0)', 'Workflow', and 'Links'. The 'General Info' tab is active. It contains fields for 'Date Created' (11/1/2012), 'Date Required' (11/8/2012), 'Date Answered', 'Discipline' (Civil), and 'Category' (Differing Field Condition). Below these are 'Author Company' (Jacobs Engineering Group), 'Authored By' (Jeffrey Stephens), and 'Author I Number' (001). The 'Question' field is highlighted with a red box and contains the text '[11/1/2012 Jacobs Engineering Group - Jeffrey Stephens] test'. There are 'Add/View Comments...' links next to the Question and Answer fields. The 'Answer' field is currently empty.

Figure 3.0

#### 4) Enter Notes

Select the Notes Tab. Enter the **Suggestion, Spec Section, and Sketch Numbers**

★ Note:

1. Click the Add/View Comments to add the suggestion.
2. Comments may be read-only or not visible

Figure 4.0

#### 5) Enter Impact

Select the Impact Tab:

Enter **Cost Impact**

★ Note: If you enter Yes please enter an amount and comments.

Enter **Schedule Impact**

★ Note: If you enter Yes please enter the number of calendar days and comments.

Enter **Drawing impact**

★ Note: Please update the comments and check the Drawing update if applicable.

Figure 5.0

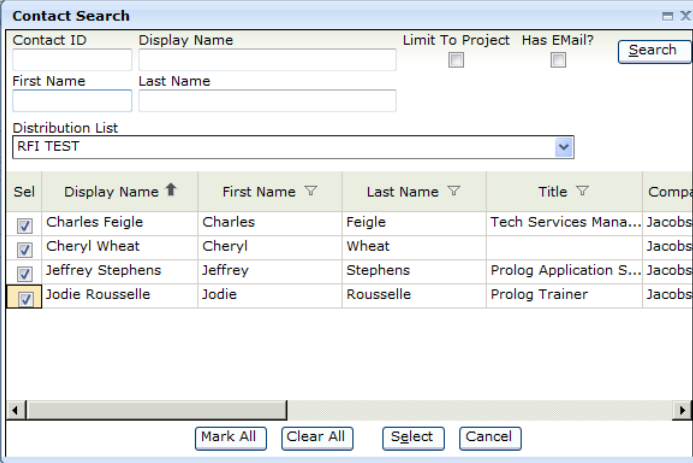
#### 6) Enter Courtesy Copies

Select the Courtesy Copy tab: Add Contacts individually by clicking the **New** button and selecting or typing the contact name.

Suggested: Click the **Add** button.

Figure 6.0

Clicking the Add Button will open the Contact Search for users or use the distribution list.



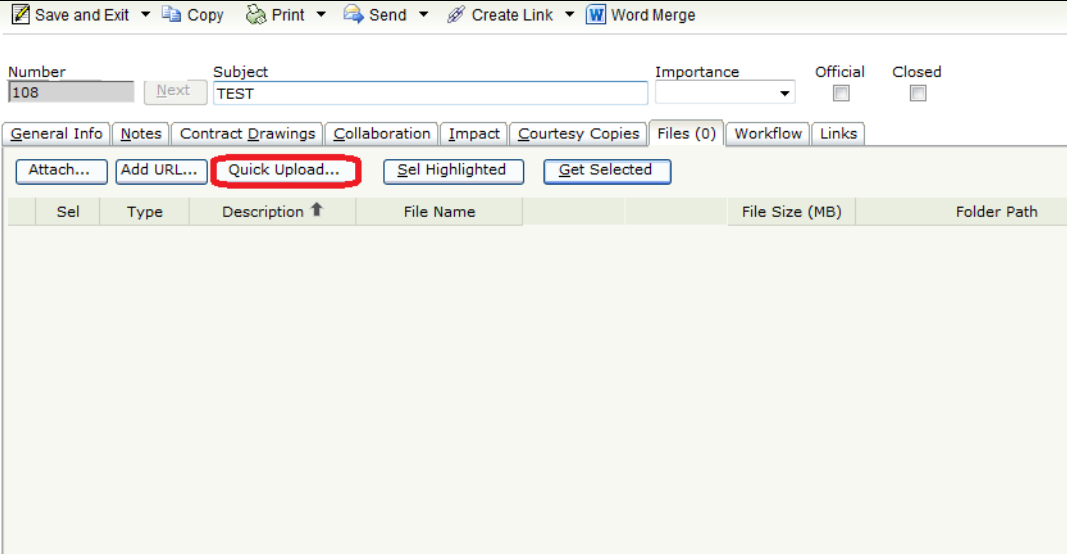
The Contact Search dialog box contains search filters and a table of results. The filters include Contact ID, Display Name, Limit To Project, Has Email?, First Name, and Last Name. A Search button is located to the right of the filters. Below the filters is a Distribution List dropdown menu showing 'RFI TEST'. The table below has columns: Sel, Display Name, First Name, Last Name, Title, and Company. It lists four contacts: Charles Feigle, Cheryl Wheat, Jeffrey Stephens, and Jodie Rousselle. At the bottom are buttons for Mark All, Clear All, Select, and Cancel.

Sel	Display Name	First Name	Last Name	Title	Company
<input checked="" type="checkbox"/>	Charles Feigle	Charles	Feigle	Tech Services Mana...	Jacobs
<input checked="" type="checkbox"/>	Cheryl Wheat	Cheryl	Wheat		Jacobs
<input checked="" type="checkbox"/>	Jeffrey Stephens	Jeffrey	Stephens	Prolog Application S...	Jacobs
<input checked="" type="checkbox"/>	Jodie Rousselle	Jodie	Rousselle	Prolog Trainer	Jacobs

Figure 6.1

7) Attach Files

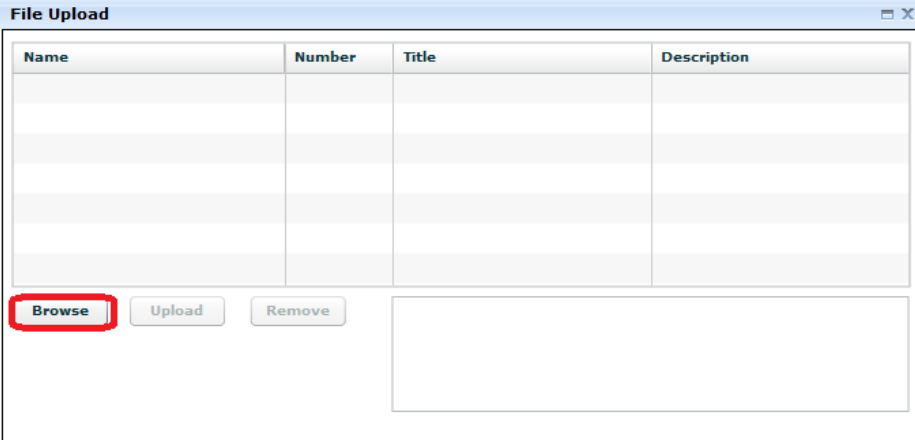
Select the Files tab:  
The most effective way to add files it to use the **Quick Upload** function. You can also select **Attach Upload** function and the Document Manager will display.



The Document Manager interface shows a toolbar with Save and Exit, Copy, Print, Send, Create Link, and Word Merge. Below the toolbar are fields for Number (108), Subject (TEST), Importance, Official, and Closed. A tabbed interface shows General Info, Notes, Contract Drawings, Collaboration, Impact, Courtesy Copies, Files (0), Workflow, and Links. Below the tabs are buttons for Attach..., Add URL..., Quick Upload... (highlighted with a red box), Sel Highlighted, and Get Selected. A table below has columns: Sel, Type, Description, File Name, File Size (MB), and Folder Path.

Figure 7.0

Select the **Browse** button.



The File Upload dialog box contains a table with columns: Name, Number, Title, and Description. Below the table are buttons for Browse (highlighted with a red box), Upload, and Remove. A large text area is located at the bottom right.

Name	Number	Title	Description

Figure 7.1

Select the Files that you wish to upload.

Update the following fields:  
**Number**, **Title**, and **Description**.

Click the **Upload** button.

Name	Number	Title	Description
Field Change Management Process	001	Field Change Mgmt	Description
Users.xls	002	User List	Description

Browse Upload Remove

Files selected to upload:  
 Field Change Management Process 060107 rev 1.pdf  
 Users.xls  
 2 file(s) selected at 46.14KB

Figure 7.2

The Files will appear in the grid.

Save and Exit Copy Print Send Create Link Word Merge

Number 108 Subject TEST Importance Official Closed

General Info Notes Contract Drawings Collaboration Impact Courtesy Copies Files (2) Workflow Links

Attach... Add URL... Quick Upload... Sel Highlighted Get Selected

Sel	Type	Description	File Name	File Size (MB)	Folder Path
<input checked="" type="checkbox"/>	Attachme...	Description	Field Change Mana...	0.02	
<input type="checkbox"/>	Attachme...	Description	Users.xls	0.02	

Figure 7.3

8) Assign RFI

Select the Collaboration Tab. Click the **New** Button:

Enter the **To Contact Information**.

★ Note: You may simply type the contact name in First Name Last Name.

★ Note: The following fields will be auto-populated: From Company, From Contact, Date Sent, Date Received, Action, Sent From, etc.

Save and Exit Copy Print Send Create Link Word Merge

Number 108 Subject TEST Importance

General Info Notes Contract Drawings Collaboration Impact Courtesy Copies Files (2)

**New** Insert Add Multiple... Delete Get Files

	From Company	From Contact	To Company	To Contact	Date
*	Jacobs Engine...	<input type="checkbox"/> Jeffrey Stephens	<input type="checkbox"/>	<input type="checkbox"/>	

Figure 8.0

**Prolog Converge**  
**RFI (Request For Information)**  
**Work Instructions**

9) Save RFI

From Company	From Contact	To Company	To Contact	Date Sent	Date Received	Action
Jacobs Engine...	Jeffrey Stephens	Jacobs Engine...	Charles Feigle	11/2/2012	11/2/2012	<input checked="" type="checkbox"/>

Figure 9.0

10) Notification

A Notification similar to the one right will be send to the TO Contact and the Courtesy Copy recipient will be on the CC line.

From: ☐ converge@noreply.com  
 To: ☐ Ardley, Charlie  
 Cc: ☒ Stephens, Jeffrey  
 Subject: SADARA Training Project - STQ 004 Pending Action

Message RFI Detailed.pdf (50 KB)

### STQ Pending Action

The following RFI is pending your response.

To view additional details about this STQ, you may open the attached PDF.

[To view the full STQ form in the Prolog Converge Web Client, click here.](#)

<b>Project:</b>	SADARA Training Project
<b>STQ Number:</b>	004
<b>STQ Subject:</b>	STQ Subject
<b>STQ Question:</b>	[11/14/2012 Jacobs Engineering Group - Jeffrey Stephens] QUESTION
<b>STQ Suggestion:</b>	[11/14/2012 Jacobs Engineering Group - Jeffrey Stephens] Suggestion
<b>Date Submitted:</b>	14/11/2012
<b>Date Required:</b>	21/11/2012
<b>Action From:</b>	<b>Action Required By:</b>
Jeffrey Stephens	Charlie Ardley

*Note: The STQ process does not authorize scope /schedule/cost changes*

Figure 10.0